



STATE OF TENNESSEE

DEPARTMENT OF HUMAN SERVICES

Information Systems Division

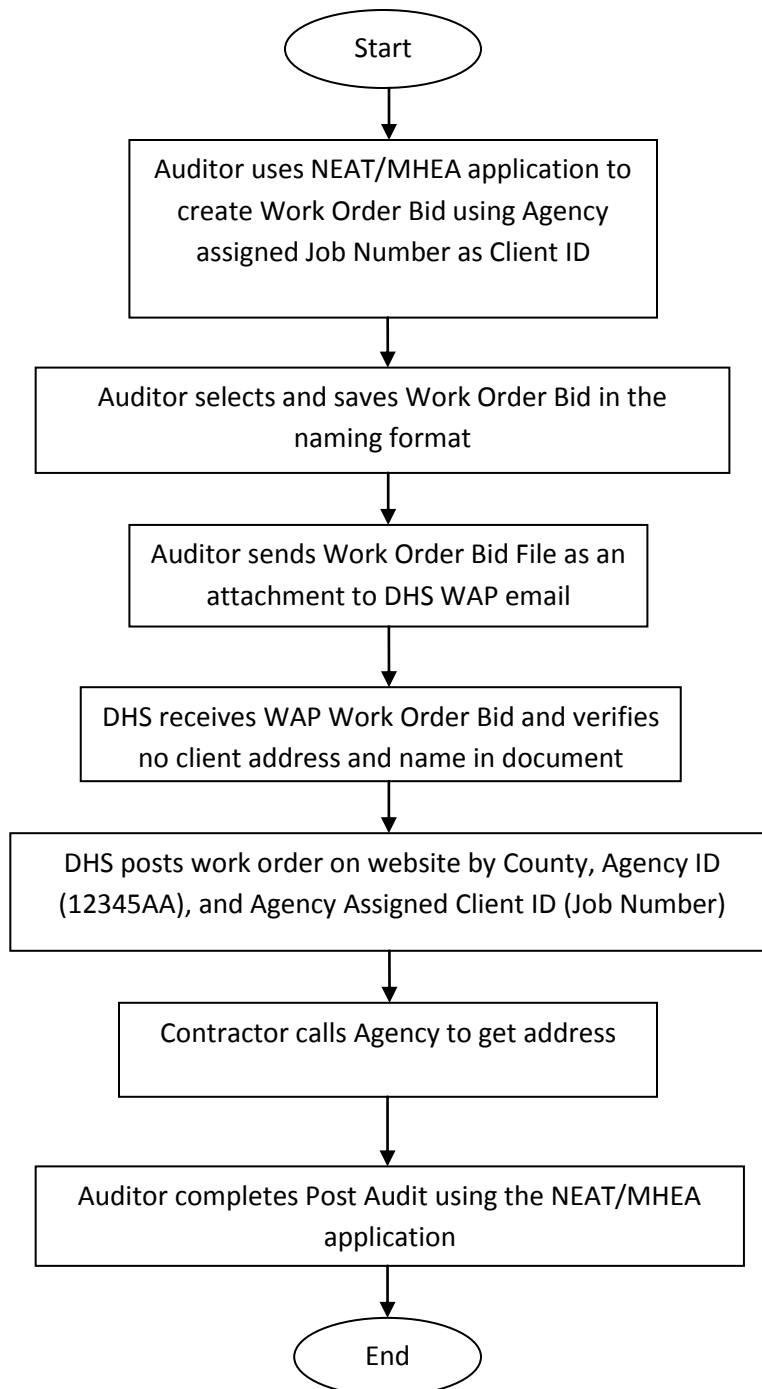
DHS .Net Systems Development

**Procedures for Submitting a Work Order Bid
To The Department of Human Services (DHS)
Weatherization Assistance Program (WAP)**

Version 1.1

Prepared by the WAP Team

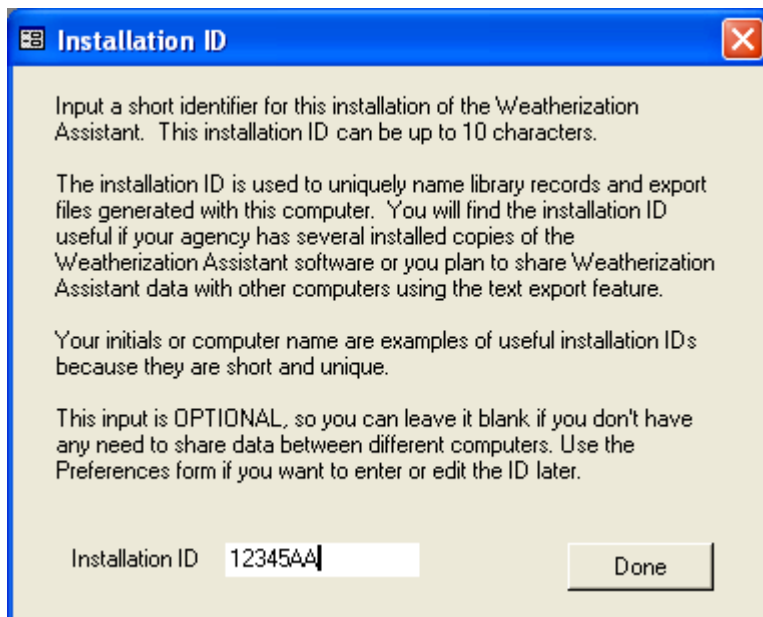
How to Create a Work Order Bid to Send to DHS – Complete Business Process Workflow



How to Create a Work Order Bid to Send to DHS - Details

Pre-requisites to send a Weatherization Assistant Program (WAP) NEAT/MHEA Work Order Bid .PDF file to DHS via an email attachment:

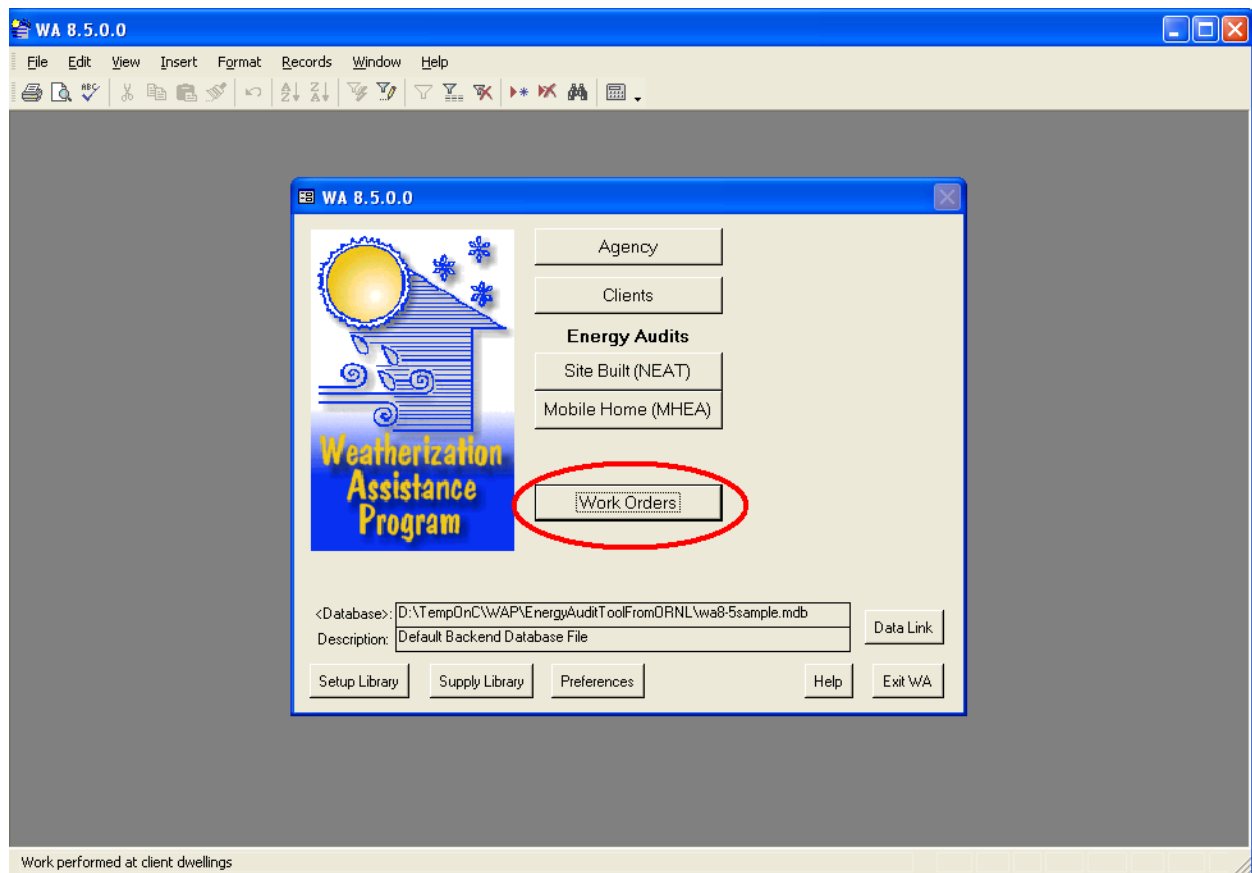
1. The Weatherization Assistant (NEAT/MNEA) Version 8.5 or above **must** be installed on a desktop or laptop personal computer (PC) and set up per instructions from the Weatherization Assistance Program's http://www.waptac.org/sp.asp?mc=tech aids_audits website or TVA and ORNL training sessions.
2. When installing the Weatherization Assistant (NEAT/MNEA) Version 8.5 or above program, make sure to input the Agency ID as the "Installation ID" shown below:



3. There **must** be access on this user PC to an email account that allows the user to send and receive email with attachments. The email attachment will be the Weatherization Assistant NEAT/MHEA Program Work Order Bid.
4. The user **must** be familiar with currently updated virus scanning software installed on the user's PC. Each .PDF file to be emailed to DHS should be scanned for viruses prior to attaching the file to an email.

Steps to create, save, and send a NEAT/MHEA Work Order Bid .PDF file to DHS via an email attachment:

1. Download the free Access Snap Shot file to .PDF file converter available from the <http://www.bullzip.com/products/pdf/info.php> website. Follow the website's instructions for installing the program. Note: this program will allow the user to print to a PDF file from the Weatherization Assistant NEAT/MHEA Program. Be sure to set the user PC's "Default Printer" to "Bullzip PDF Printer" when sending DHS the "Work Order Bid" described later. If user does not know how to set a "Default Printer" for the user PC, then the user should consult the PC's operation manual or a knowledgeable technical person.
 - a. When creating the client in the Weatherization Assistant NEAT/MHEA Program, make sure that the initial client is identified **only** by client ID, County, and zip code information (Note: the "Client Name" from the "Work Order Contact" tab is "NA" below). The Job number is used as the client ID is assigned by the Agency when the client application for weatherization assistance has been approved by the Agency. This is done so that when the user sends DHS the "Work Order Bid" attachment, the client is identified only
2. Create the Work Order Bid per the Weatherization Assistant NEAT/MHEA Program requirements. Make sure that the "Work Order" number and the Agency "Client ID" (Job Number) are the same when entering the "Work Order" number.
3. In order to create a "Work Order Bid" document, click on the NEAT/MHEA "Work Order" button circled in red below:



4. At the “Work Order” screen shown below, click on the “Select Report” drop down circled in red, and select the “Work Order (Bid Form)” option:

The screenshot shows the 'WA 8.5.0.0' application window. The main form is titled 'WORK ORDER' and contains various input fields for client information, work order details, and a comment. A 'Work Order Economic Summary' box is also present. At the bottom, there are two sections: 'WORK ORDER' with search filters and a 'REPORT' section. The 'REPORT' section has a 'Select Report' dropdown menu, which is circled in red. This dropdown menu is open, showing a list of report options: 'Work Order', 'Work Order', and 'Work Order (Bid Form)'. The 'Work Order (Bid Form)' option is highlighted in dark red, indicating it is the selected report.

Report	Description	#
Work Order	Work Order	1
Work Order (Bid Form)	Work Order (Bid Form)	2


5. With “Work Order (Bid Form)” shown in the “Select Report” drop-down list, click on the “Snapshot File” button circled in red below:

The screenshot displays the WA 8.5.0.0 software interface. The main window is titled "WORK ORDER" and contains several sections:

- Work Order Information:** Includes fields for Work Order ID (12345AA0001), Client ID (12345AA0001), Client Name (NA), and Alt. Client ID (Davidson). It also has tabs for Status, Measures (20), and Photos (0).
- Work Order Details:** Includes fields for Agency (12345AA), State (TN), <Audit Name> (Sample single wide), <Supply Library> (Sample Supply Library), Contractor/Crew, and Work Order Type (Weatherization).
- Work Order Economic Summary:** A purple box containing fields for Number of Active Measures (20), Cumulative Estimated Cost (\$4,522.72), and Cumulative Actual Cost.
- WORK ORDER Section:** Includes dropdowns for selecting reports by Work Order Name, Client ID, Alternate Client ID, Contractor, and Client Name. It also has a "New" button and a "Copy" button.
- REPORT Section:** Includes a "Select Report" dropdown menu set to "Work Order (Bid Form)". Below it are buttons for "Preview", "Print", and "Snapshot File". The "Snapshot File" button is circled in red.

The status bar at the bottom indicates "Select the Report to Output".

6. The user now sees a “WA Report Work Order (Bid Form)” report as shown below. The user should click on the “OK” button. (Note: The “Client Name” is “NA”, the “Client ID” (Job Number) from the Agency is “12345AA0001”, and the “Alt Client ID” is “Davidson” for the county. The same client information should appear in the “WA Report Work Order (Bid Form)” report in the body and footers circled in red below:

 **Work Order (Bid Form)**

WORK ORDER INFORMATION
Work Order Name: 12345AA0001
Work Order Type: Weatherization
Audit Name: Sample single wide

CLIENT INFORMATION
Client Name: NA
Client ID: 12345AA0001
Alt. Client ID: Davidson

CLIENT CONTACT INFORMATION
Address: , TN
Applicant/Person of Record ☒

AGENCY INFORMATION
Agency: 12345AA
Address: 123 Sample Street
Nashville, TN 37248

Company Name & License Number: _____
Contractor's Signature: _____

COMMENT
Single wide mobile home/1

Measures

Measure 1 Repair door Components

Comment

#	Material / Labor	Description / Comment	Units	Qty	Unit Cost	Total
10	Unspecified	Misc Material	Each	1		

Order Detail

Measure Sub Total:

Field Notes:

Measure 2 General Air Sealing Components

Comment

Units	Qty	Unit Cost	Total
Each	1		
Each	1		

Measure Sub Total:

Field Notes:

Microsoft Access

Snapshot output file created: C:\Program Files\Weatherization Assistant 8-5\output\WoSumBid-04.snp

OK

Client Name: NA
Client ID: 12345AA0001
Alt. Client ID: Davidson

Work Order (Bid Form)
Work Order Name: 12345AA0001
Report Run On: 7/2/2009

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Client Name: NA
Client ID: 12345AA0001
Alt. Client ID: Davidson

Work Order (Bid Form)
Work Order Name: 12345AA0001
Report Run On: 7/2/2009

7. At the top of the “WA Report – Work Order (Bid Form)” document shown below, the user should click on the “Print” icon circled in red (be sure that the default printer is set to “Bullzip PDF Printer” as described in the :

WA Report - [rptWorkOrderSumBidForm : Report]

File Window Help

Print

Work Order (Bid Form)

WORK ORDER INFORMATION
Work Order Name: 12345AA0001
Work Order Type: Weatherization
Audit Name: Sample single

CLIENT INFORMATION
Client Name: NA Address:
Client ID: 12345AA0001
Alt. Client ID: Davidson

CLIENT CONTACT INFORMATION
Applicant/Person of Record ☒

AGENCY INFORMATION
Agency: 12345AA
Address: 123 Easy Street
Nashville, TN 37203
Agency Phone: (615) 555-1212
Fax: (615) 555-1212
Email Address: franco.stratton@tn.gov

Company Name & License Number: _____
Contractor's Signature: _____

COMMENT

Measures

Measure 1 Repair door
Comment

#	Material / Labor	Description / Co
10	Unspecified	Misc Material

Other Detail

Field Notes

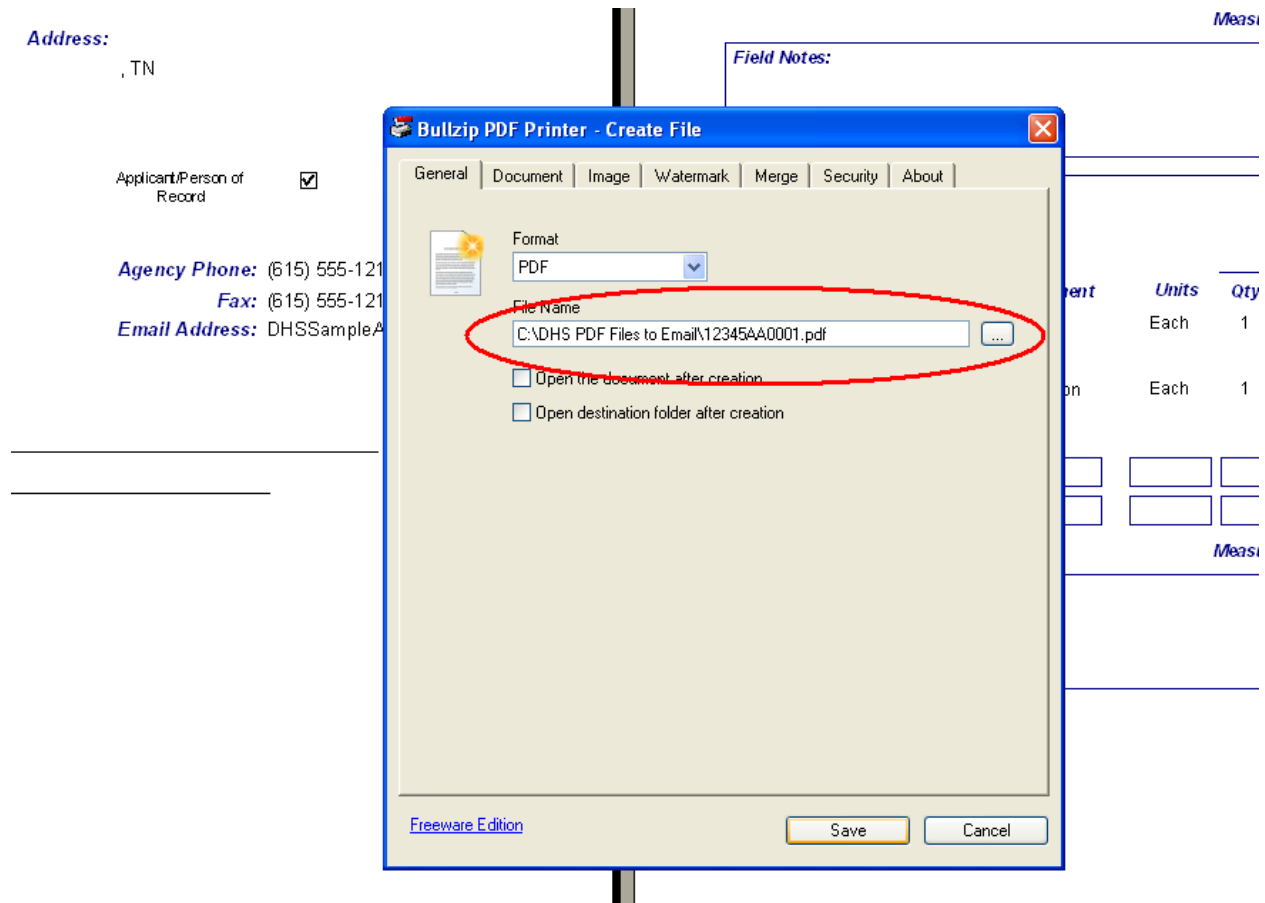
Measure 2 General Air Sealing
Comment

#	Material / Labor	Description / Co
1	Insulation	General air sea (setup cost)
10	Miscellaneous Supplies	Infiltration Redu

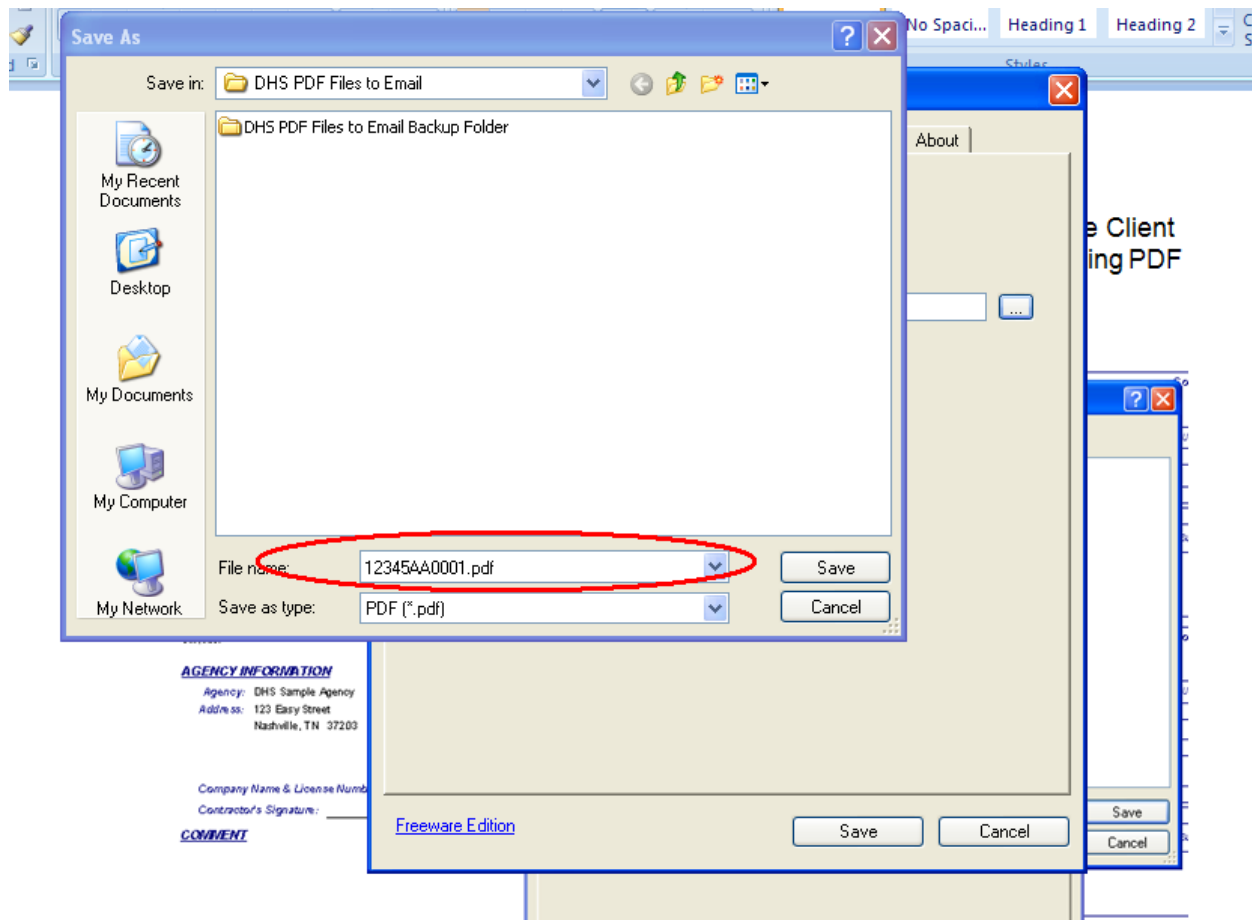
Other Detail

Field Notes

8. The user then sees the “Bullzip PDF Printer – Create File” Form, and the user should make sure that the “PDF” selection is made in the “Format” drop down list shown circled in red below. The user can then select the folder in which the user wants to save the .PDF file by clicking on the “...” button next to the “Filename” file selector also shown in red below:

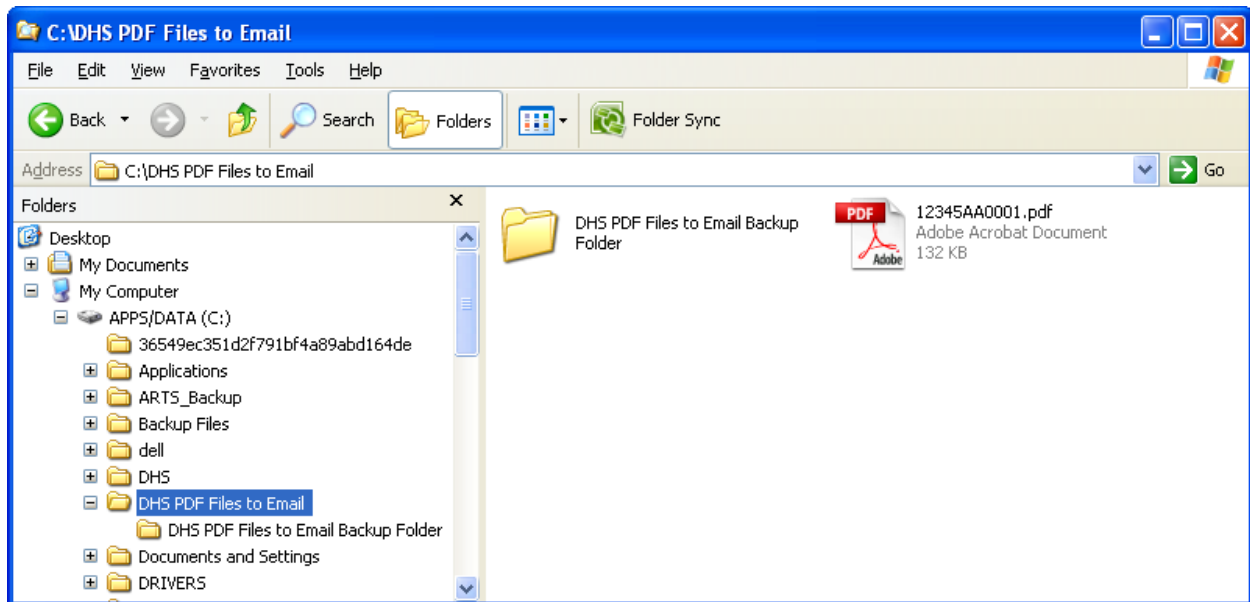


9. The user must now rename file before saving it to the chosen folder in the Client ID format (shown below circled in red) in a folder on the client PC designated for emailing PDF attachment files to DHS. The user should then click on the “Save” buttons to save the PDF file to the chosen file name and designated folder location.

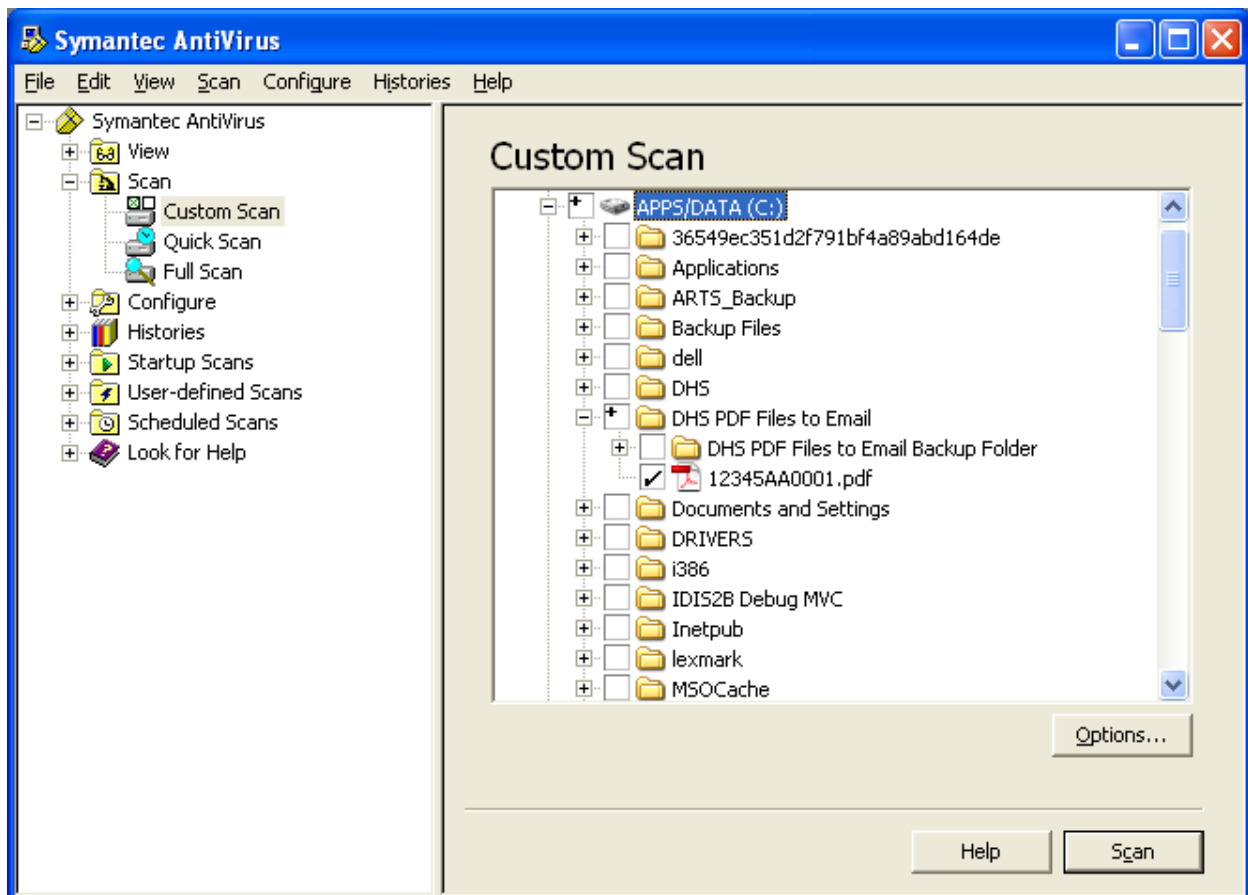


Please Note: In the “Save as:” drop down, the user has chosen to save the “12345AA0001.pdf” file to the “DHS PDF Files to Email” folder. Please notice a second folder named the “DHS PDF Files to Email Backup Folder”. The user should save the “12345AA0001.pdf” file to the “DHS PDF Files to Email” folder, but after the virus scan and sending the file as an email attachment to the DHS email address, the user should cut-and-paste the “12345AA0001.pdf” file to the “DHS PDF Files to Email Backup Folder” or similar folder as backup as an option to serve as an archive of sent files. This optional procedure prevents confusion when selecting the current file to be attached to an email.

10. The file should be saved by the user to the specified folder as shown below in Windows Explorer:



11. The user must then use the PC's up-to-date virus scanning software to scan the file per the virus scanning help or manual instructions on how to do this. The virus scan might be similar to that shown below, but the exact procedures depend upon the particular virus scanning software installed on the user machine:



12. After the user scans the .PDF file for a virus per the virus software instructions, the user should send an email to Weatherization_Assist_Program.DHS@tn.gov with the subject of the email entered as "Subject: 12345AA0001 Work Order Bid" similar to the email shown below (**Note:** Shown is just an example, and the user's email system may vary). In the body of the email, please put the Client ID, the client County, and the Client Zip Code as circled in red below:

Send | Save draft | Attach ▼ | Spell check | Rich text ▼ | ! ↓ | Cancel

From: MyEmail@Hotmail.com Show Cc & Bcc

To:

Click the "To" button to see your contact list | ✕

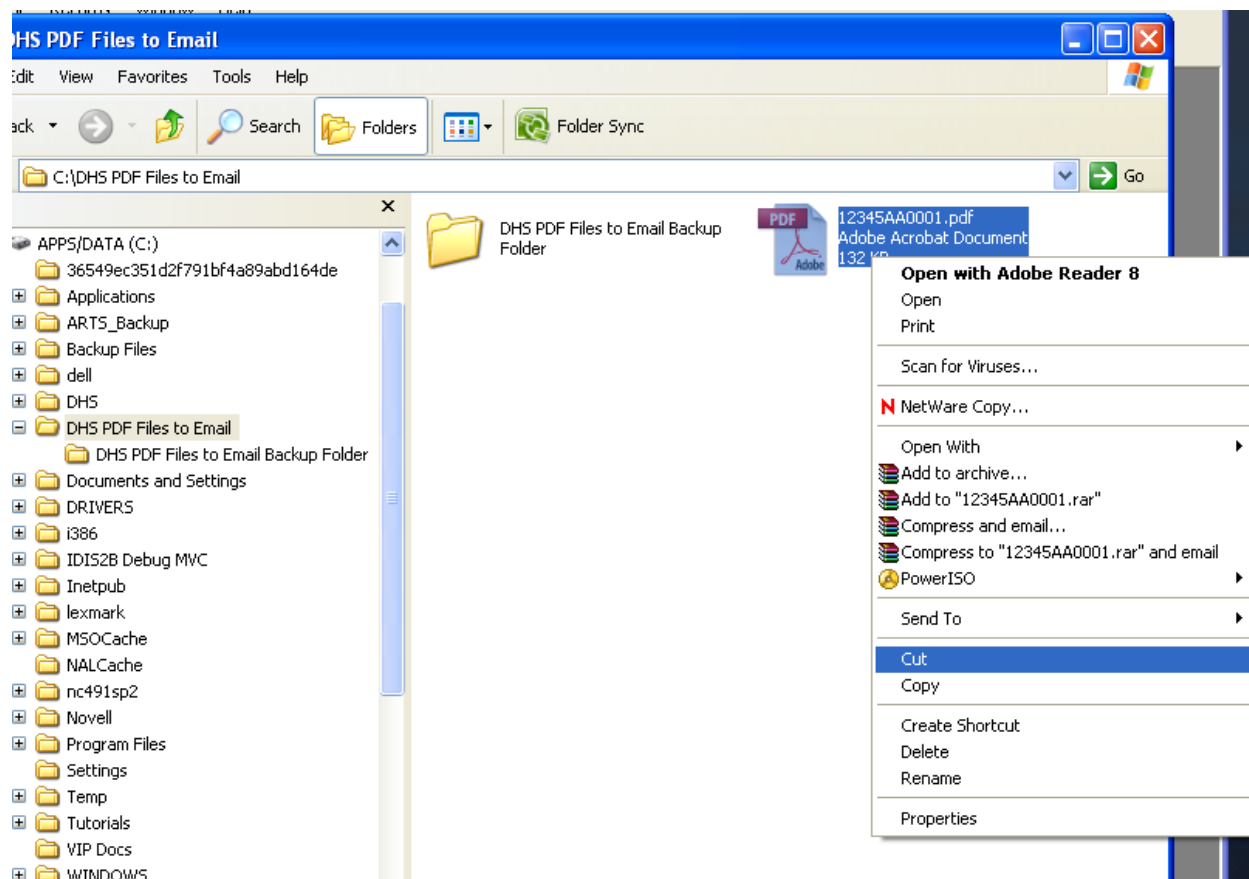
Subject:

📎 Total size: 131.5 KB of 10.0 MB

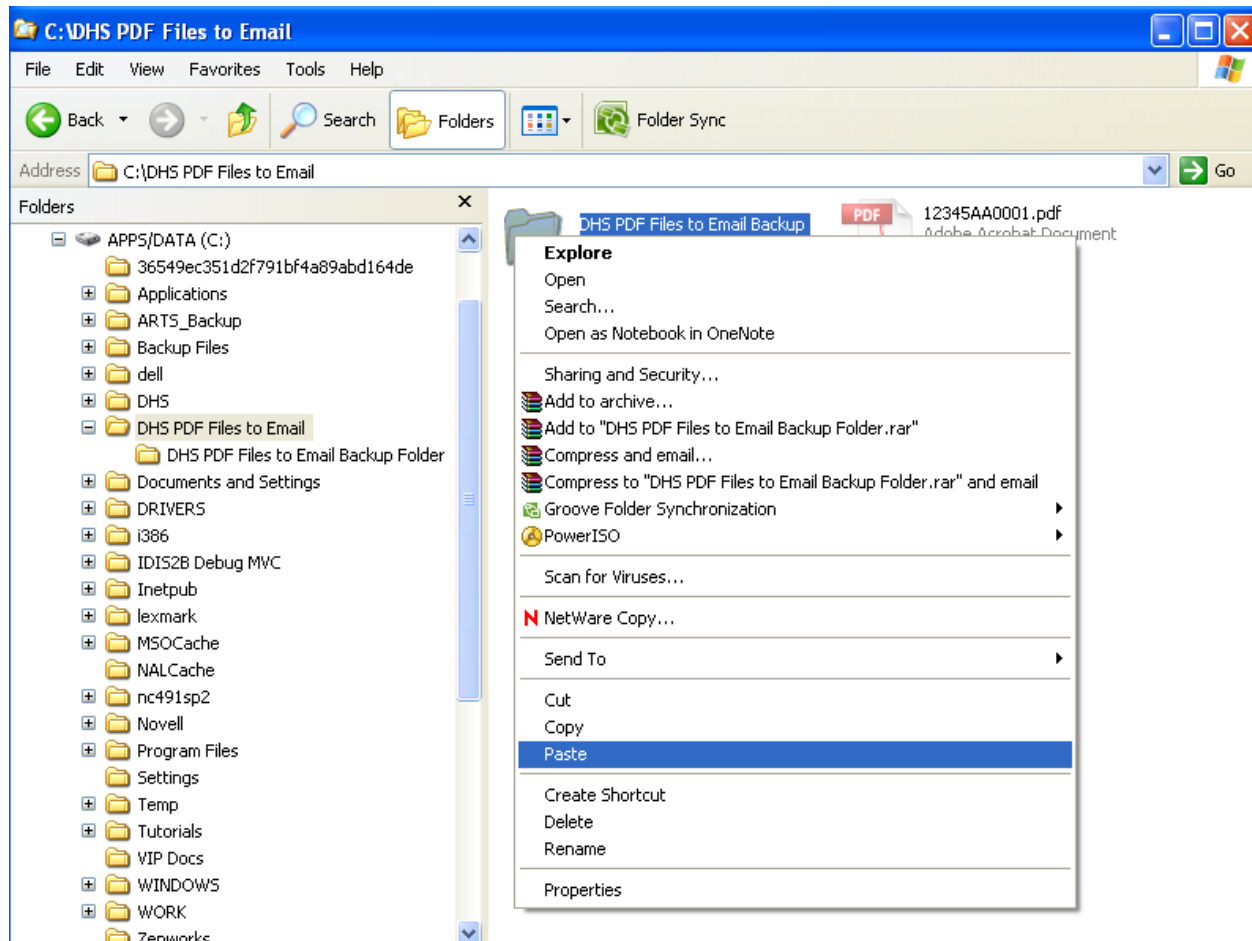
Verdana 10 **B** *I* U [List icons] [Link icon] [Image icon] [Text color icon] [Background color icon] [Font size icon] [Smiley icon]

12345AA0001
Davidson
37203

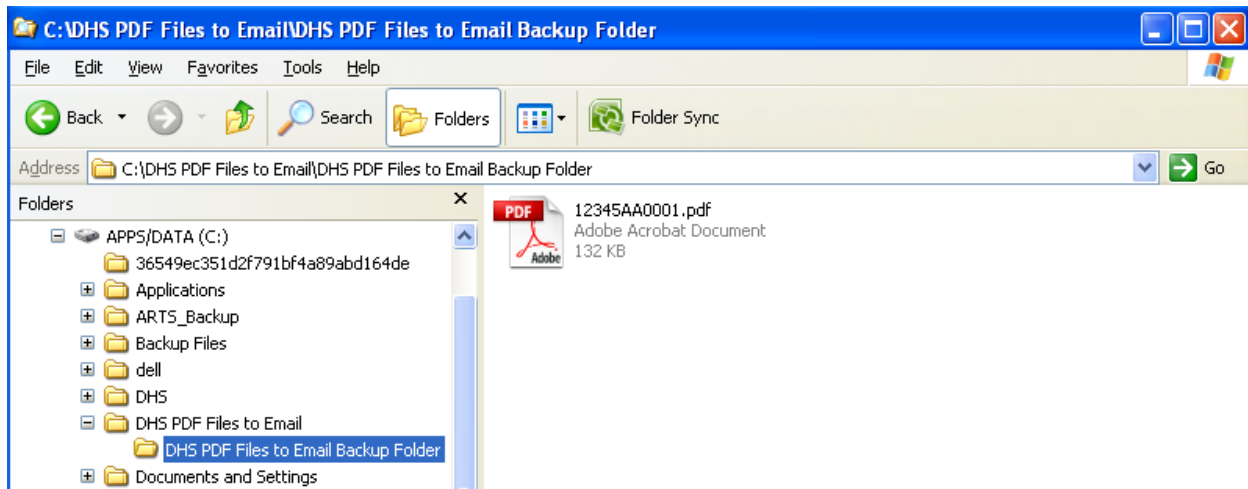
13. The user should right click on the original .PDF file (named “12345AA0001.pdf” in the example above) to see a menu as shown below. On the Windows menu, the user should select “Cut” as shown below:



14. The user should then right click on the back up folder, and select “Paste” from the Windows menu to transfer the .PDF file (named “12345AA0001.pdf” in the example above) to the designated folder:



15. The .PDF file (named “12345AA0001.pdf” in the example above) will now be transferred to the backup folder:



16. This completes the process for the user to email a “Work Order Bid” .PDF document to the DHS Weatherization staff. The user can now go back and update the Client forms so that the Work Order will contain the necessary client information to go to the Agency. Also, the user can now reset the user PC default printer to whatever is appropriate. However, the next time that the user needs to send a PDF file to DHS, the default printer must be set to “Bullzip PDF Printer” when sending DHS another “Work Order Bid” file attachment via email.